



*The Commonwealth of Massachusetts*  
*State Board of Retirement*  
*One Ashburton Place, Boston, MA 02108-1607*

*Timothy P. Cahill*  
*Treasurer and Receiver General*  
*Chairman*

ROOM 1219  
(617) 367-7770  
1-800-392-6014

**BENEFICIARY BLANK**  
**or**  
**CHANGE OF BENEFICIARY BLANK**

**TO THE BOARD OF RETIREMENT**

SSN# \_\_\_\_\_

In accordance with the provisions of Section 11 of Chapter 32 of the General Laws

I, \_\_\_\_\_ a member of The State Employees' Retirement System hereby nominate the following-named beneficiary or beneficiaries in the proportion designated or in the alternative other beneficiaries to receive any sum referred to in said Section 11 due at the time of my death.

GIVE COMPLETE NAME AND ADDRESS OF EACH BENEFICIARY	RELATIONSHIP TO MEMBER	Proportion to be paid if more than one is appointed. (Words, not figures)
Name.....	.....	.....
Address.....	.....	.....
Name.....	.....	.....
Address.....	.....	.....
Name.....	.....	.....
Address.....	.....	.....
Name.....	.....	.....
Address.....	.....	.....

The right to change any beneficiary is reserved. This may be done by filing a new blank.  
If you are naming contingent beneficiaries, please stipulate

(Proportion must equal 100%)

The types of payment covered by Section 11 include:

**Before your retirement –**

1. The payment of the accumulated total of deductions credited to your account in the annuity savings fund at the date of your death.

**Following your retirement –**

2. The payment of any cash refund due at your death if your retirement was elected under Option (B).
3. The payment of any prorated monthly amount due at your death if your retirement was elected under either Option (A) or Option (B)

Election of a beneficiary under Option (C) (the survivorship allowance) is NOT made on this form. Such election is made on the Option Election Form.

Date Signed..... Signature of Member.....

Witness..... Address.....

Address..... Department.....

**A BLANK WITH CORRECTIONS OR ERASURES WILL NOT BE ACCEPTED.**  
**THE PERSON DESIGNATED AS BENEFICIARY CANNOT BE A WITNESS TO YOUR SIGNATURE.**

FORM MUST BE COMPLETED BY TYPEWRITER OR IN INK AND PROPERLY WITNESSED

# **NOMINATION OF BENEFICIARY**

## **Chapter 32 of the General Laws**

SECTION 11(2)(c) States in part, any member, upon his written notice on a prescribed form filed with the Board prior to his death, may nominate, and from time to time change, one or more beneficiaries to receive in designated proportions, or in the alternative, any sum becoming payable under the provisions of this subdivision on his death, and/ or any uncashed checks in payment of amounts to which he was entitled from the funds of the system of which he was a member, of any sum payable to his estate from said funds; provided, that any such beneficiary or beneficiaries nominated by a minor shall be his kindred. The payment of any such sum or portion thereof to his beneficiary or beneficiaries of record surviving at his death shall bar the recovery of such payment by any other person. If there is no beneficiary of record or if any beneficiary of record is not living at the death of such member, such sum or the amount which would have been paid to such beneficiary if he had survived such member, as the case may be, shall be paid to the legal representatives of such member; provided, that if any such sum or amount does not exceed three hundred dollars, and if there has been no written demand upon the Board for payment thereof by a duly-appointed executor or administrator of the estate of such member and the Board has not otherwise been informed that probate proceedings relative to such estate have been commenced, such sum or amount may be paid after the expiration of ninety days from the date of death of such member, to the person or persons appearing in the judgment of the Board to be entitled thereto. The payment of any such sum or amount in such a manner, or to the natural or legal guardian or conservator of a minor or incompetent beneficiary, shall constitute a legal settlement of all claims on account thereof to the extent of such payment and shall bar recovery of such payment by any other person. Payment shall not be made under this subdivision if the deceased member is survived by a beneficiary appointed under option (d) of subdivision (2) of Section 12 who is eligible to receive the allowance provided by said option.

## **GENERAL INFORMATION**

The nomination of one or more beneficiaries may be changed from time to time by filing a new blank.

Payment or proportionate payments to any beneficiary or beneficiaries will be paid in one sum.

A beneficiary nominated by a minor must be of his kindred.

If a minor is designated as a beneficiary, payment will be made to the guardian of such minor.

### **AFTER THE DEATH OF A MEMBER:**

1. The amount of any accumulated total deductions credited to the member's account in the annuity savings fund is payable in one sum or in proportionate sums to the surviving beneficiary or beneficiaries, except that in any case where the deceased member is survived by a widow and/ or children eligible to receive benefits under the provisions of Section 12B or 12 (2) (d) an election by such widow or by a guardian on behalf of such children to receive such benefits shall have preference over the right of any beneficiary named on this form. This provision is not applicable after retirement allowance has become effective for a member.

2. The amount of any cash refund due under Option (b) shall be paid to the surviving beneficiary or beneficiaries.

Payment to any beneficiary or beneficiaries shall bar the recovery of such payment by any other person.

If no beneficiary has been named or if no beneficiary survives, any sum due at the death of a member shall be paid to the legal representatives of such member.

3. If the sum does not exceed \$300 the Board of Retirement may make payment, after the expiration of 90 days, to the person or persons appearing in its judgment to be entitled thereto; provided that no written demand by a duly appointed executor or administrator has been made, nor probate proceedings have been commenced.

Any action taken by the Board of Retirement within the provisions of Section 11 shall constitute a legal settlement of all claims on account of amounts payable under such section.

4. The prorated monthly amount due upon the death of the member under Option (A) or Option (B) is payable to the beneficiary or beneficiaries named on this form; if no beneficiary survives, then to the person or persons who in the judgment of the Board of Retirement are entitled thereto. Any such payment will constitute a legal settlement of all such claims and shall bar recovery by any other person.